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AUTHOR Blossfeld, Hans-Peter; Shavit, Yossi
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ABSTRACT

This study is a comparative analysis that addresses the question: to what extent has the relationship between parental socioeconomic characteristics and educational opportunities changed over time and why? The document suggests six hypotheses regarding change in the effects of social origins on education transitions: (1) modernization hypothesis: the effects of social origin on all transitions decline; (2) reproduction hypothesis: the effects of social origins decline on earlier transitions but not on later transitions; (3) hypothesis of maximally maintained inequality: the effects will only decline at those transitions for which the attendance rates of the privileged classes are saturated; (4) socialist transformation hypothesis: socialist transformations brought about an initial reduction in the effects, that will then be followed by increased effects; (5) life course hypothesis: the effects decline across transitions but are stable across cohorts; and (6) differential selection hypothesis: the effects decline across cohorts, but the effects on later transitions increase across cohorts. The 13 industrialized countries included in the study may be classified according to their basic cultural and economic systems into three major groups: (1) western capitalistic countries: United States of America, (former) Federal Republic of Germany, Great Britain, Italy, Switzerland, the Netherlands, Sweden, and Israel; (2) non-Western capitalistic countries: Japan and Taiwan; and (3) western socialistic countries: Poland, Hungary, and Czechoslovakia. Study results show that educational expansion facilitates the persistence of inequalities in educational opportunity. Tables summarize the major findings with respect to educational expansion and attainment, change in the effects of social origins on highest education attained, and cohort differences. (DK)

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Persisting Barriers:

Yossi SHAVIT

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Persisting Barriers: Changes in Educational Opportunities in Thirteen Countries

HANS-PETER BLOSSFELD
and
YOSSI SHAVIT

BADIA FIESOLANA, SAN DOMENICO (FI)

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Italy

Persisting Barriers: Changes in Educational Opportunities in Thirteen Countries

by

Hans-Peter Blossfeld

Department of Political and Social Sciences

European University Institute

Florence, Italy

Yossi Shavit

Department of Sociology and Anthropology

University of Haifa

Israel

August 1991

This paper summarizes results of nation-specific studies in: Yossi Shavit and Hans-Peter Blossfeld (eds.) Persistent Inequality: Changing Educational Stratification in Thirteen Countries. Westview Press: Boulder, Colorado (forthcoming). Clare Tame provided helpful comments on earlier versions of this paper.

1. INTRODUCTION

During the twentieth century, industrial societies have experienced a remarkable process of social and economic change. In the occupational system, there has been a long-term shift in employment from the primary to the secondary sector, and from the secondary to the tertiary sector (Erikson and Goldthorpe, 1985; Haller, 1989). In most industrialized countries this shift has been accompanied by a change in class composition and an upgrading of the occupational structure; the major decreases in agricultural and manual employment have been in the less skilled rather than the more skilled jobs, and the greatest increases in non-agricultural and non-manual employment have occurred not in relatively low-level clerical, sales and personal service grades but in professional, administrative and managerial occupations (Goldthorpe, 1986). For all industrial countries, the twentieth century has also been a period of increased bureaucratization and rationalization, as ever greater proportions of the workforce have been employed in larger and more formalized organizations and firms (Blau and Duncan, 1967). This tendency has been intensified in many countries - particularly in the 1960s and 1970s - by a rapid expansion of the welfare state and increasing public employment (Flora, 1983, 1988; Esping-Andersen, 1990).

Industrialization, bureaucratization, and the expansion of the (welfare) state did not occur in isolation from changes in the educational system. Changes in the class structure and the upgrading of the occupational distribution have increased the demand for better education (Bell, 1975; Featherman and Hauser, 1978; Blossfeld, 1985, 1989, 1990). The progressive rationalization and bureaucratization of working life have enhanced the value of educational and skill qualifications for job opportunities (Blau and Duncan, 1967; Spence, 1973; Arrow, 1973; Mincer, 1974; Thurow, 1978). This is particularly true for public sector employment which especially tends to be based on formal educational qualifications (Müller and Mayer, 1976; Müller, 1990). Thus, throughout the twentieth century, we observe the increasing importance in industrial societies of the role of education, together with a long-term growth in the enrollment of men and women in the educational system. From one birth cohort to another, the expansion of the educational

system has enabled ever larger proportions of children from all social strata to complete primary and secondary education, and to attend tertiary education. Indeed, in almost all industrial countries, primary, and even some types of lower secondary education are now virtually universal (Meyer et al., 1977). The distribution of educational credentials has shifted upward and the average level of educational attainment has risen.

Given this long-term process of educational expansion, reinforced in many countries by educational reforms, one might expect a drop in the impact of social background on educational opportunity. Boudon (1974), for example argued that if school attendance rates increase over time, then inequalities in educational opportunity will steadily decline, because the lower socioeconomic classes can increase their attendance rates by more percentage points than the upper classes whose rates are already high and constrained by ceiling effects.

Surprisingly, however, empirical studies showed that inequality of educational opportunity between social strata has been quite stable over time. For the United States, Featherman and Hauser (1978) reported that the effects of social background on years of schooling during the first half of the twentieth century has remained more or less unchanged. For Great Britain, Halsey, Heath and Ridge (1980) showed that in the inter-war period the British working class increased their chances of securing a place at a selective secondary school from 20% to 26%, while the service class increased theirs from 70% to 77%. The relative growth was greater for the working class, but the absolute difference between the classes increased. This led Halsey and his associates (1980) to conclude that the effect of educational expansion on equality of opportunity is dependent on the starting points of the various classes, and on the saturation levels of the educational institutions themselves. "If the working-class starting point is very low ... there can be a high rate of growth but low absolute gains. A higher starting point on the other hand, may yield a lower rate of growth but, providing it is still well short of the saturation level, the absolute gains can be large, and class differences can decline." (Halsey, Heath and Ridge 1980: 217) Thus, Halsey and his associates were convinced that in the early stages of educational growth expansion would lead to greater inequality,

and that only in the later stages would it reduce social inequality in the attainment of a given level of schooling.

The comments of Boudon, and the analyses of Featherman and Hauser together with those of Halsey and his associates, reflect a certain ambiguity as regards the concept of inequality of educational opportunity and its measurement (see also Sorensen 1983, 1986; Sorensen and Blossfeld 1989). Should we measure change in inequality of educational opportunity by the change in effect of social origin variables on the mean number of school years completed? Or in terms of change in class-specific proportion completing a given level of schooling? Or again, in terms of change in the ratio between such proportions? Mare (1980) clarified the confusion by showing that previously employed measures of changes in equality of educational opportunity fail to make a clear distinction between two different processes: the expansion of the educational system and the processes of selection and allocation of students. He proposes a model of change in inequality of educational opportunity whose parameters are not affected by the degree of educational expansion or contraction. The model views the educational attainment process as a sequence of transitions (for example, from first to second grade, from second to third grade, etc.). At each level of the sequence a student can either make the transition or drop out. The odds of making the transition are determined by various exogenous variables such as students' parental education, family size, etc.. Mare formulates the model as a set of logit regressions, and estimates the linear and additive effects of exogenous variables on the log odds of making each transition. Mare shows that OLS effects of social origins on number of school years completed can be expressed as functions of both the transition probabilities and the logit effects of social origins on the transition probabilities. He shows further that strata differences in the probabilities of completing any given educational level are also a function of the transition probabilities and the logit effects of strata categories. Thus Mare formalizes the relationship between the distribution of schooling (i.e. the extent of educational expansion) and the parameters which govern its allocation. He shows that where education expands, ordinary least square regression effects would tend to decline across

cohorts, unless the association between social origins and educational transitions (i.e. the logit effects) would increase.

Another important feature of Mare's model is that the logit effects tend to decline across transitions. Mare (1981) attributes the decline to the "... differential dropout rates, which systematically reduce differences among children from different socioeconomic levels on unmeasured determinants of grade progression... Greater homogeneity on unmeasured factors at higher levels of schooling reduces the effects of observed socioeconomic variables" (Mare 1981:f.5). The important implication of this phenomenon is that as growing proportions of successive cohorts reach higher levels of schooling, their selectivity declines, and the homogeneity in the unmeasured factors is lower than it had been at that level for earlier cohorts. Consequently, the effects of socioeconomic level increases. Thus, even if the social processes and mechanisms of educational selection and allocation (such as ability testing, tracking, tuition fees) remain unchanged, growing educational participation rates would push up the logit effects of social origins on educational transitions. Mare (1980) finds that in the United States, growing proportions of successive cohorts reached the intermediate educational levels and that social origin effects on the final transitions increased. In other words, the logit effects of social origins on educational transitions tended to increase. The end result of the process was a reduction in the variance of schooling, an increase in its mean, but little change towards a greater equality in the distribution of years of schooling across social strata (Featherman and Hauser 1976, 1978).

An important implication of Mare's work is the reformulation of the original research question. Rather than simply ask how have educational attainment processes changed historically, we now distinguish between changes in the process which are due to the changing distribution of schooling and changes in the association between educational transition and social strata.

Following Mare's study, there have been several analyses of changes in educational opportunities in European countries. In France, Garnier and Raffalovitch (1984) found

that the associations between social class and educational transition rates of cohorts born between the beginning of the century and 1954 were fairly stable despite impressive increases in the level of educational attainment. In the Netherlands, Bothenius, Lohman, and Peschar (1983) demonstrated that there is no systematic change of origin-specific educational chances over time. Dronkers (1983) and Vrooman and Dronkers (1986) confirmed this result with an analysis of changes in transitions to specific secondary educational levels. In a study of the Federal Republic of Germany, Handl (1986) reported a slight reduction of inequality of opportunities in early educational transitions. However, in access to university graduation, the effects of social background increased. Simkus and Andorka (1982: Note 1) reanalyzed some of Halsey's British data and found a similar pattern to that reported by Mare for the United States. In particular, the association between social origins and continuation from A-level higher secondary education to university increased during the postwar period. Simkus and Andorka argued that this similarity is not surprising since previous British-US comparisons have revealed similar effects of social origin on educational attainment despite the countries' different educational structure and institutions (Kerckhoff, 1974; Treiman and Terrell, 1975).

Simkus and Andorka went on to analyze the Hungarian educational system for the period 1923-1973 when it had undergone radical institutional changes after World War II. They found a strikingly different picture than that of the US or the UK. Hungary had also experienced an expansion in educational enrollments at all levels. But, unlike the US and UK, there was an actual decrease in the effects of social origins on the earlier transitions, accompanied by stable effects on the later transitions. Simkus and Andorka attributed the initial decline to Hungary's aggressive educational policies during the 1950s, aimed at the improvement of educational opportunity for the lower socioeconomic classes. Interestingly, they also reported that there were marked improvements in the chances of women to complete the middle- and higher-level transitions as compared to those of men. In a comparison of Czechoslovakia and Hungary, Mateju (1984) reported that the two countries are quite similar. In both cases he finds a decrease of class inequality in educational opportunity at the lower levels of schooling, and no significant change at higher levels.

In a study of the Philippines, Smith and Cheung (1986) applied Mare's model for cohorts of men and women born during the first half of the twentieth century. They found that average levels of schooling had increased dramatically for all social groups and that the linear regression effects of social origins on educational attainment (i.e. on the number of years of schooling) had declined. However, the association between social origins and educational transitions remained stable throughout the period examined.

In Israel, Kraus and Hodge (1990) studied the educational attainment process for Israeli Jews, and found declining effects of fathers' socioeconomic characteristics on educational attainment across cohorts born during the 1930s and 1940s. However, models of educational transitions (Shavit and Kraus 1990) revealed that the association between social origins and transitions remained quite stable for comparable cohorts of Israeli Jews. The exception is a drop in the effect of ethnicity on the transition from primary to secondary education. The authors attributed this decline to the expansion of vocational secondary education which enabled growing proportions of oriental Jews to enter secondary education, albeit in a lower track.

In sum, the various studies report different patterns of change or stability in the parameters of educational attainment, and educational transition models for the different countries. Why these differences? Clearly, they may reflect interesting societal differences in the structures of educational systems and in the processes of educational stratification. However, most of these studies focus on single countries (cf. Mateju 1984, Peschar 1991) and do not make an attempt to explore the role of societal factors in producing differences in the educational attainment process. Furthermore, there are major methodological differences between the studies that hinder a systematic comparison of results. For example, there are differences between studies in the definition and measurement of key variables, and in the time-span covered by the data. In addition, some studies focus on men while others analyze data for both sexes.

This article presents the results of thirteen very similar studies of educational attainment in thirteen different countries.[1] The countries offer a range of variation in important variables such as industrial development and culture, political systems and history, and types of educational structures. The countries included in this comparison are the United States, the (former) Federal Republic of Germany, the Netherlands, Sweden, Great Britain, Italy, Switzerland, Taiwan, Japan, Poland, Hungary, Czechoslovakia, and Israel. Each study was conducted by researchers who have an intimate understanding of the country in question. Most of these studies employed relatively recent nationally representative data, covering cohorts who were educated over a broad historical period (except the study for Switzerland). In particular, we studied change in the educational opportunities for cohorts who attended school before and after major educational reforms or changes in attendance rates. We also employed very similar statistical models although we preferred to avoid complete standardization of method, because the institutional structure of the educational system varies from country to country.[2] For example, in some countries, there is formal and rigid streaming or tracking (e.g. Germany, Poland) while in others there is less rigid curricular differentiation (e.g. the United States). Furthermore, the important independent variables in the educational attainment process vary across societies. For example, in some societies, ethnicity or race are important independent variables in the educational process while other societies are ethnically homogenous. A completely standardized analysis would have lost these unique features of the different societies. However, we did attempt to maintain sufficient standardization to enable a systematic comparison of the results. Thus, all studies follow a common set of guidelines which are described in below.

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[1] The paper is a summary and synthesis of the studies in: Yossi Shavit and Hans-Peter Blossfeld (eds.) Persistent Inequality: Changing Educational Stratification in Thirteen Countries. Westview Press, Boulder, Colorado (1992. forthcoming).

[2] A recent study by Müller and Karle (1990) compares similarities and differences in the educational selection process in the Federal Republic of Germany, France, Sweden, England/Wales, Scotland, Nothern Ireland, the Republic of Ireland, Hungary, and Poland in a systematic way. This study, however, does not analyze changes in educational attainment over time.

The current paper summarizes and synthesizes the results of the country specific studies. It is organized in the following way. We begin with a theoretical discussion about the determinants of socioeconomic inequalities in educational opportunity and develop several hypotheses about historical changes therein. Then, we describe the project and the models which are employed in order to achieve comparability of concepts, methods, and variables. Finally, we synthesize the results of the country-specific studies and draw some more general conclusions about the relationship between educational expansion and equality of educational opportunity.

2. THEORETICAL PERSPECTIVES AND HYPOTHESES

The basic question which is addressed by the comparative analysis can be stated as follows: to what extent has the relationship between parental socioeconomic characteristics and educational opportunities changed over time and why? In the following we will concentrate on theoretical perspectives which have guided the comparative study of this question.

Cultural and Economic Theories of Educational Stratification

Socioeconomic differences in educational attainment are broad and pervasive in all industrialized societies: children from working-class or farming families attain less education on the average than children from higher socioeconomic origins (Gambetta 1987). Among the possible hypotheses explaining the pervasive class and ethnic inequalities of educational attainment, two are most prominent: cultural capital thesis and economic constraint thesis. The two explanations highlight different aspects of the issue and complement one another.

The cultural capital thesis, first advanced by Bourdieu and Passeron (Bourdieu and Passeron 1964, 1977; Bourdieu 1966) contends that children from families with a low

level of parental education are likely to lack those abilities normally transmitted by the family and valued and rewarded by schools. In particular, cultural resources such as dominant societal values, attitudes, language skills, and styles of interaction are acquired in school more quickly by children already familiar with them. Consequently, selection in school favors children from those families that already possess the dominant cultural advantages.

By contrast to the cultural capital thesis, Boudon's (1974) economic constraints thesis, contends that in most countries, education must be financed by family resources which include direct costs (e.g. tuition fees, learning materials, and transportation) and forgone earnings. Thus, it is reasonable to expect that education is particularly dependent on the economic resources of the family of origin. Although it is true that in many countries lower-class families now send their children to school for longer periods, it does not contradict the basic statement that poor "... families which do so need at the same time to make heavier sacrifices and to have relatively stronger ambitions" than families who are better off (Gambetta 1987:80). Thus, cultural and economic inequalities between classes and status groups combine to produce educational inequalities among their children.

Theories of Change in Educational Stratification

Parsons (1970) and Treiman (1970), two main exponents of modernization theory, have suggested that the educational system expands in response to the functional requirements of an industrial society and that education plays an increasingly important role in the process of status attainment (Lenski, 1973; Treiman, 1970). It has been argued that as the level of educational requirements in industrial societies rises, and that educational qualifications become more important for occupational placement. It has also been

assumed that with increasing modernization and the expansion of the educational system, educational selection tends to become more meritocratic. Hence, inequality of educational opportunity, as measured by its dependence on socioeconomic and socio-cultural characteristics, should decrease across all educational levels over time. As we shall see below, this hypothesis is turned on its head in the final section of this article.

By contrast, cultural reproduction theorists (e.g. Collins 1971) claim that educational certificates actually serve to exclude members of subordinate and low status groups from desirable positions in the occupational structure. Education-based selection and allocation in the labor market are used to maintain the hegemony and privilege of dominant social groups (Bowles and Gintis, 1975, Bourdieu, 1973; Collins, 1971). Educational credentials therefore mirror the class structure and help legitimize inequality of job opportunity.

Reproduction theorists recognize, however, that there is an inherent conflict between the socialization role of education and its selective function. On the one hand, schooling is an effective institution by which children of subordinate-group origins are socialized into the dominant value system of the society. Therefore, representatives of the dominant groups may pressure the political system to expand the educational institutions and to absorb children of ethnic minorities or working class origins. This is consistent with the demands of the subordinate groups themselves for more education. Consequently, the attainment of primary and even some types of secondary schooling may become increasingly independent of social background. On the other hand, if the dominant groups want to maintain their privileges in the status system, they must retain their advantage in the attainment of higher educational qualifications. Thus, students of subordinate group origins are diverted from higher education by various means. These range from the expansion of non-academic educational alternatives (e.g. Karabel, 1972; Shavit, 1984), to raising the admission standards in universities. Thus, the effect of social background on the attainment of higher educational qualifications, are not reduced despite the democratization of graded schooling.

In summary, although both the modernization and reproduction approaches agree that educational expansion - whether the result of functional imperatives of economic modernization or an outcome of competition between status groups - leads to greater equality of educational opportunities at the lower levels of the educational system over time, they disagree as to the predicted trends in inequality of education at the higher levels of the educational hierarchy: modernization theorists predict a decreasing trend of inequality of education over time; and reproduction theorists expect an unchanged or even an increasing importance of social origin.

Raftery and Hout (1990) suggested a more radical version of reproduction theory. They argue that inequality in educational opportunity is "maximally maintained". This means that in modern societies, the effects of social origin at all levels of education do not change, except when the enrollment of advantaged groups is already so high at a given level that further expansion is only feasible by increasing the opportunity of disadvantaged groups to make the transition. Accordingly, where grade-saturation occurs expansion of education is the consequence of the demands for education made by advantaged groups which increase their proportion in the course of the upgrading of the occupational structure. As long as these advantaged groups are not fully integrated at a given level of education, they strongly support efforts to expand educational participation by eliminating tuition fees, lowering admissions standards, increasing capacity etc. Expansion in participation at these given levels of education, however, does not lead to more educational equality between social groups because the increases for the advantaged groups will be greater as these groups favor higher education more. Therefore, expansion of education does not lead to a better chance for disadvantaged groups to make the transition and will not change the association between social origins and given educational transitions. This was the case in Britain during the 1950s and 1960s (Halsey, Heath and Ridge, 1980) and in Ireland (Raftery and Hout, 1990). Only if for a given level of education the participation is saturated for the advantaged groups (this means if the advantaged groups already have transition rates close to 100%) and there is further expansion, then the association between social origin and grade progression will decline. In particular it is suggested that, if primary and lower

secondary education is nearly universal for the privileged groups, then any further expansion of secondary education may lead to declining effect of social origin on these transitions.

Reproduction theory views education as an instrument by which dominant social elite exclude other classes from attaining desirable occupations. When elite are replaced by previously subordinate classes, one would expect the educational system to open-up for these (previously) less privileged strata. Thus, one can expect that the association between the socioeconomic origins of students, and their educational transition rates should have declined in the decades following the socialist transformations in Eastern and Central Europe after World War II. As noted, this hypothesis is consistent in part, with the results of earlier studies of formerly socialist societies where the effects of socioeconomic origins declined on the earlier educational transitions. However, these studies also reported no change in the effects on later transitions. The Socialist Transformation Hypothesis also suggests that once the new elite establish their privilege and gain control of the school system, they take steps to secure the educational advantages of their own children. Thus, we can expect an increase the effects of social origins in the later years of socialist regimes. This hypothesis is discussed in some detail in the studies on Hungary and Czechoslovakia by Szelenyi and Aschaffenburg, and by Mateju respectively.

As noted earlier, previous studies on educational transition have found that the effect of social origin is strong at the beginning of the educational career and then declines for later transitions. One hypothesis to explain this pattern is that younger pupils are more dependent on the preferences of their parents and the economic conditions of their families of origin than older ones. With increasing age, students will increasingly be able to decide on their own what they want and will rely less on parental resources, particularly in countries where higher education is not connected with high costs for the family of origin (Müller 1990:9). An alternative explanation for this finding is that children from lower social classes meet very severe selection barriers at the earlier educational transitions. Thus, only the brightest working-class children make it to higher

levels of the school system. By contrast, middle- and upper-class children progress into secondary schools and universities with greater ease. Consequently, among candidates for later transitions, socioeconomic origins is less and less correlated with scholastic aptitude and with other student characteristics - such as motivation - that determine educational success. Therefore, the indirect effect of origins that is mediated by aptitude and motivation, is reduced or eliminated, and its effect is small (Mare 1981).

Thus we have two possible explanations for the decline in the effects of origins on successive transitions: an explanation that hinges on arguments about life course differences in dependence on family, and one which relates it to the selection process. These two explanations suggest competing hypothesis regarding cohort differences in the parameters of the educational transitions process. The life course hypothesis states that if primary and lower secondary education become universal and lead to a decrease in the effect of social origin at these earlier levels, then the effects of social origin on higher grade progression will stay small across cohorts because older pupils are less dependent on the preferences and the economic conditions of their families than younger ones. This means that expansion of primary and secondary education does not only abolish or drastically reduce earlier severe selection barriers for disadvantaged groups, but will also lead to more equality of origin-specific educational opportunity across cohorts.

By contrast, the differential selection hypothesis states that if the proportion of successive birth cohorts in the risk set to make a transition increases, so will the observed association between social origin and the transition probability. This is simply an implication of the argument concerning unmeasured variables (like ability, ambition and motivation etc..) within different social groups: as growing proportions of all social groups reach higher levels of schooling across cohorts, the social groups become more equal with respect to unmeasured variables which results in there being larger effects of observed socioeconomic factors across cohorts.

To summarize, we have suggested the following six hypotheses regarding change in the effects of social origins on educational transitions:

1. Modernization Hypothesis: the effects of social origins on all transitions decline;

2. Reproduction Hypothesis: the effects of social origins decline on earlier transitions but not on later transitions;

3. Hypothesis of Maximally Maintained Inequality: the effects will only decline at those transitions for which the attendance rates of the privileged classes are saturated;

4. Socialist Transformation Hypothesis: socialist transformations brought about an initial reduction in the effects. This will then be followed by increased effects;

5. Life Course Hypothesis: the effects decline across transitions but are stable across cohorts;

6. Differential Selection Hypothesis: the effects decline across cohorts but the effects on later transitions increase across cohorts.

3. THE COMPARATIVE PROJECT: COUNTRIES AND METHODS

The countries

Thirteen industrialized countries are included in the study. They may be classified according to their basic cultural and economic system into three major groups: (1) Western capitalistic countries: the United States of America, the (former) Federal Republic of Germany, Great Britain, Italy, Switzerland, the Netherlands, Sweden, and

Israel; (2) non-Western capitalistic countries: Japan and Taiwan; and (3) Western socialistic countries: Poland, Hungary, and Czechoslovakia.[3]

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[3] The book, Y. Shavit and H.-P. Blossfeld (eds.), op cit, contains the following country-specific analyses:

1 Making the grade: educational stratification in the United States, 1925-1989, Michael Hout, Adrian E. Raftery and Eleanor O. Bell

2 Changes in educational opportunities in the Federal Republic of Germany: a longitudinal study of cohorts born between 1916 and 1965, Hans-Peter Blossfeld

3 Family background and educational attainment in the Netherlands for birth cohorts 1891-1960, Paul M. De Graaf and Harry B.G. Ganzeboom

4 Persisting inequalities in Sweden, Jan O. Jonsson

5 Educational attainment in a changing educational system: the case of England and Wales, Alan C. Kerckhoff and Jerry M. Trott

6 Inequality of educational opportunity in Italy, Antonio Cobalti and Antonio Schizzerotto

7 The lifelong shadow: social origins and educational opportunity in Switzerland, Marlis Buchmann and Maria Charles with Stefan Sacchi

8 Change in educational stratification in Taiwan, Shu-Ling Tsai and Hei-Yuan Chiu

9 Trends in educational attainment in Japan, Donald J. Treiman and Kazuo Yamaguchi

10 Who wins and who loses in a socialist redistribution in Czechoslovakia?, Petr Mateju

11 Changes in educational opportunity in Hungary, Sonia Szelenyi

12 Educational inequalities in postwar Poland, Barbara Heyns and Ireneusz Bialecki

13 From peasantry to proletariat: changes in the educational stratification of Arabs in Israel, Yossi Shavit

14 Educational stratification on observed and unobserved components of family background, Robert D. Mare

These societies do not constitute a representative sample of all industrialized societies. However, the list does represent considerable variations in the level and timing of industrialization (compare for example, the United Kingdom to Taiwan and Sweden), the political system (democracies, socialist states, and non-democratic states), the structure of the distributive systems (market-based versus bureaucratically determined, ethnic versus class stratification), the organizational form of the school systems (nationally centralized in most societies, decentralized in the United States, and regional in Germany and Switzerland); rigidly tracked in most societies (except the United States and Sweden), educational attendance rates, and formal public commitment to equality of opportunity. Thus, the array of countries enables an evaluation of the hypotheses listed earlier in a variety of societies.

Methods: Partial Standardization

Earlier, we indicated that the studies share very similar methods, but that unique features of some societies, as well as limitations of available data, compelled some researchers to deviate from the common mold. In the present section, we list the methodological commonalities as well as the major differences between the studies.

Twelve of the studies employ nationally representative data for successive cohorts born between the second decade of the twentieth century and the 1960s (see Table 1.1). In some studies data are available for even older cohorts (Netherlands, Sweden, United States), while in other societies, the data do not extend to the most recent cohorts (U.K. Czechoslovakia). The study on Switzerland, analyzed data for only two cohorts (born in 1950 and 1960) which attended school before and after a major expansion of Swiss educational system.

The data sets range in size from about 1,000 to 25,000 cases. Most include data for men and women, but for three studies (Taiwan, Japan, and the UK), only data for men were available.

All thirteen studies analyze cohort differences in the effects of socioeconomic origins on length of schooling and on educational transitions. Their effects on length of schooling are estimated in ordinary least squares (OLS) regressions of highest school grade completed (or attended). The exception is the British study in which the dependent variable is defined as the highest qualification attained. In all studies, socioeconomic origin is represented by father's education and by father's occupation. In most studies, father's occupation was measured by occupational prestige or prestige-like scales (for example the Treiman (1977) scale or the Wegener scale (1985)), but in a few, it was measured by a set of categories approximating EGP (Erikson, Goldthorpe, and Portocarero 1979) occupational classes. Father's education was usually measured by the highest school grade completed by the father. Several of the studies include additional measures of socioeconomic origins such as a variable indicating farm origins (Taiwan, Israel, US), and mother's education (Taiwan and the US).

The effects of socioeconomic origins on educational transitions are estimated with logit regressions of educational transitions as proposed by Mare (1980). In the planning stage of the study, we had hoped to develop a common classification scheme of educational transitions. The common scheme relies on the basic distinction between the primary, secondary, and tertiary stages of education. It assumes that a stage must be completed before a transition can be made to the following stage. Thus, we defined the following transitions: (a) from no education to a complete primary education; (b) from primary to any post-primary education; (c) from any post-primary to complete post-primary education; (d) from complete post-primary to some tertiary education.

Most of the studies employed this common scheme. However, four of the educational systems did not fit into the general mold and were analyzed with a modified scheme of educational transitions. In Britain, people may obtain important credentials through various forms of alternative educational frameworks such as further education. Kerckhoff and Trott suggest that both regular and alternative forms of educational qualification must be considered in a study of educational attainment. Therefore, they employ two alternative schemes of educational transitions. One consisting of transitions within the

regular school system and the other consisting of all qualifications obtained. The two sets of analyses produce similar results. Similarly, in his work on Sweden, Jonsson distinguishes between the transition from primary to academic post-primary school, and the transition from primary to any post-primary education. Jonsson also defines the later transitions in terms of examinations taken and degrees attained rather than in terms of school years completed. In Germany, vocational training is an important alternative to academic secondary and post-secondary education. It also plays an important role in the process of socioeconomic attainment. In his study for Germany, Blossfeld employs the common scheme of transitions, but also estimates the effects of social origins on the transition from lower secondary education to vocational training. Buchmann and Charles study for Switzerland also two alternative sets of transitions for the academic and vocational courses of educational attainment.

4. RESULTS OF THE INTERNATIONAL COMPARISON

The results of the comparative study are summarized in Tables 1.1, 1.2, and 1.3. Table 1.1 summarizes the major findings with respect to the expansion of the educational systems and the increase in educational attainment. Table 1.2 summarizes the results with respect to change in the effects of social origins on highest education attained. Finally, cohort differences in the effects of social origins on educational transitions are summarized in Table 1.3.

Pattern of Educational Expansion

We begin by focusing on inter-cohort changes in highest educational attainment. As is shown in Table 1.1, educational expansion is strong and universal in all countries - whether socialist or capitalist, Western or non-Western. The average level of educational

attainment has risen across cohorts (column 2). In all thirteen societies, primary, and even some types of lower secondary education have become nearly universal during period under study (column 3 and 4). This means that in all these societies, decisions about the educational continuation of children are no longer taken at very early ages. As we shall see, this has important implications for equality of educational opportunity. In all the societies, the major branching point, between continuation and discontinuation of schooling occurs at the transition from primary to secondary education.

Insert Table 1.1 about here

The expansion of the educational systems are evaluated relative to the changing sizes of cohorts. Thus, expansion of a given level of schooling is defined as an increase in the proportions of successive cohorts who attended that level. In all societies, expansion has been strong at the lower secondary level, less pronounced at the upper secondary level and modest at the tertiary level. In some countries tertiary education increased only slightly, or failed to increase at all, relative to the changing sizes of the cohorts to which it catered (Netherlands, Taiwan, Hungary, and Poland). Educational systems appear to open up more fully at the bottom than at higher educational levels. Higher levels of education do not expand fast enough to absorb the growing proportions of graduates from lower levels of the school system, and educational bottlenecks can become quite sever, especially in the transition from secondary to tertiary education.

It would seem that there is a universal pattern of educational expansion policies. Educational systems open up step-by-step from the bottom up. In the process, successive birth cohort improve their chances to move up a small step within the educational hierarchy. However, higher levels of education still remain fairly exclusive. This pattern of expansion leans towards the arguments of reproduction theory rather than towards modernization theory. A persistent rationing of higher credentials restricts the pool of

candidates to positions of privilege at the top of the occupational hierarchy, and legitimize inequality of job opportunities.

In several countries (e.g. Germany, Switzerland, Sweden, Poland and for Israeli Jews see Shavit (1990)) this basic pattern of educational expansion has been accompanied by an impressive expansion of tracking and vocational education as an alternative to academic secondary or higher secondary education. In some cases, vocational training opens employment opportunities in a wide range of occupations. It is attractive for children from lower socioeconomic backgrounds because it provides fast access to a skill. Thus, the availability of vocational education therefore enables the educational system to absorb disadvantaged groups at the secondary level without disturbing the basic social interests of advantaged groups at higher levels in the school system (Shavit, 1989).

In the last column of Table 1.1, we summarize changes in the educational inequalities between men and women. Ten of the thirteen studies analyze data for both sexes. All ten studies report a substantial reduction in the differences between the mean educational attainment of men and women. In some societies (United States, Germany, Hungary, and Poland), women's mean attainment in recent cohorts, even surpassed those of men. This indicates that women in particular have profited from educational expansion in industrial countries.

Socioeconomic Inequalities in Educational Attainment

Given the long-term process of educational expansion in all of the industrialized countries, one might expect a drop in inequality of educational opportunity between socioeconomic strata. As noted earlier, each of the studies in the project estimated the traditional linear regressions of educational attainment (measured as number of school years) on measures of social background for successive cohorts. Changes in equality of educational opportunity are operationalized as cohort differences in the effects of social origins on educational attainment. The results are summarized in Table 1.2. In two

countries (Sweden and the Netherlands) there is a decline in the effect of both father's education and father's occupation across cohorts. In six societies there has not been any significant change in the effects of either indicator of social origins on educational attainment (Germany, United Kingdom, Switzerland, Hungary, Poland, and Israeli Arabs). The remaining five studies report mixed results: an decrease in the effect of one variable, and stability or increase in the effect of the other (United States, Italy, Taiwan, Japan, and Czechoslovakia). Interestingly, the study for Czechoslovakia reports a decline in the effect of father's education on educational attainment for cohorts educated immediately after the introduction of the socialist reforms. However, this was followed by an increase in the effects for more recent birth cohorts.

Thus, although there is a uniform trend of educational expansion in the participant societies, there is no uniform outcome with respect to educational inequality. Most notably, in most cases, expansion has not entailed greater equality of educational opportunity among socioeconomic strata. With the exceptions of Sweden and the Netherlands, the studies do not reveal a consistent decline in the associations between social origins and educational attainment. Stability is somewhat more common with respect to the effect of father's occupation than with respect to the effect of father's education.

Insert Table 1.2 about here

Educational Transitions: Stability with the Same Two Exceptions

As noted earlier, cohort differences in linear regression effects of socioeconomic origins on educational attainment confound two distinct components: cohort differences in the proportions continuing to successive levels of education, and changes in the associations

between educational transition rates and social origin (Mare 1980). The former component is a reflection of educational expansion, whereas the latter, is a reflection of the social and institutional arrangements which govern the educational selection of different social strata. In Table 1.3, we summarize the results of logit regression analyses of the association between educational transitions and social origins.

Insert Table 1.3 about here

In column 1 of Table 1.3, we summarize the pattern of effects across transitions. We already noted that in previous studies employing this method, the effects tended to be strongest on earlier transitions and then decline for later transitions. Our findings are consistent with those of earlier studies. With the exception of Switzerland, the effects of social origins are strongest at the beginning of the educational career and then decline for subsequent educational transitions. In some countries (e.g. the Netherlands, Sweden and Germany) the effect of social origin on the transitions into tertiary education are so small that they are not significant. Thus, it would seem that social selection is most pronounced at very early stages of the educational career.

Earlier, we mentioned two hypotheses explaining this declining effect of social origin across transitions: the differential selection hypothesis, and the life-course hypothesis. The later postulates that the effects of family diminish with age, as children become less dependent on their families. The data employed by the thirteen studies, do not enable a direct test of the two hypotheses because we have not been able to control for unmeasured variables such as ability or motivation. However, the implication of the differential selectivity hypothesis is that as growing proportions of all social groups reach higher levels of schooling across cohorts, there is greater heterogeneity on unmeasured variables at higher level of schooling. This should result in increasing effects of observed socioeconomic variables across cohorts. But this is not the case in our study. Although we observe a long-term and strong educational expansion in all

countries (Table 1.1), there is no universal increase in the effect of social background on grade progression. In most countries, there is no change in the logit effects of social origin on educational transitions, and some report declining effects.

This pattern suggests that variation in unmeasured heterogeneity is not a single cause for the decline in the logit effects across transitions. In Mare's chapter of the book, it is shown that controlling for unmeasured heterogeneity in family characteristics, eliminates the decline in the effects of father's education across the early educational transitions. However, even when heterogeneity is controlled, the effect of father's education declines sharply for the completion of university college. This also suggests that the decline in the effects across the first transitions is best explained by a life course hypothesis. Presumably, older students are less dependent on family resources - cultural and material - in their educational decision-making.

Focusing on change in the association between social origins and educational transitions, we find virtual stability across cohorts. The two exceptions are Sweden and the Netherlands, where the associations have declined for transitions involving secondary education. These two exceptions are highly significant for our study. First, in neither case have the privileged classes been saturated with secondary education before the associations declined. Thus, both cases counter the Maximally Maintained Inequality (MMI) hypothesis (Raftery and Hout 1990). The MMI hypothesis is also inconsistent with the results for the US, reported by Hout and Raftery in which the middle class has been saturated, or nearly saturated, with secondary education but in which the association has actually increased at that level. Second, the Swedish model of the welfare state has been very effective in reducing class differences in everyday life chances and life styles (Erikson 1983). Jonsson therefore suggests that the equalization of living conditions in Sweden is probably the major explanation for the declining association between social origins and educaitonal opportunity. As social classes become more equal in their living conditions, the factors which differentiate their educational opportunity (e.g. differences in cultural capital and material resources) also diminish. Also the Netherlands is undergoing a similar historic process of opening-up and

equalization in the long-run. In sum, these two deviant cases suggest that long-term commitments to socioeconomic equality may lead to an equalization of educational opportunities between classes and socioeconomic strata.

On the other hand, the common experience of the three formerly-socialist states in the study tell a quite different story. In all three cases studied, there as been an expansion of educational opportunity at the primary and secondary level, similar to that found in other countries. And yet, despite the nominal commitment of their regimes to equality and equality of educational opportunity, the data reveal stability in the relationship between social origins and educational attainment. The Socialist Transformation Hypothesis suggested that the transformation was followed by an initial equalization of educational opportunity, especially at the bottom levels of the school system, followed by greater inequality in subsequent decades. In view of the data, the hypothesis now appears too optimistic. Only in Czechoslovakia, was there some indication that inequalization of educational opportunity at the lower level declined somewhat, and there too, it was followed by a return to its initial level.

In sum, despite the marked expansion of all the educational systems under study, in most countries there has been little change in socioeconomic inequality of educational opportunity. Even in extreme cases of industrial transformation (such as Taiwan, Japan, Italy), and radical changes of the occupational structure (Israeli Arabs), the parameters of educational stratification process remains stable (see also Smith and Cheung (1986)). This is a clear refutation of the Modernization Hypothesis. Only in Sweden and the Netherlands has there been a consistent equalization of educational opportunity by socioeconomic strata.

The effects of educational reforms

Several of the educational systems studied in the volume have undergone major structural reforms during the decades which are covered by the data. Most notable of course, were the transformations of educational systems during and socialist transformations in Eastern and Central Europe. But major reforms were also made in the UK in 1944, in Sweden during the early 1960s, in Japan after World War II, in Israel during the 1960s and 1970s, and the 1968 Mammoth Reform in the Netherlands. Less dramatic transformations of the educational system were introduced in other countries. The details of the reforms for each country are described in the respective chapters of Shavit and Blossfeld (1992). The finding which is common to all our studies is, however, that the reforms did not lead to a reduction in the association between social origins and any of the educational transitions. Even in Sweden and the Netherlands, which report a decline in the association, this is not attributable to the educational reforms. In Poland, educational policy was designed to form "a new Communist man" with the technical skills for productive labor, but the major effect seems in fact to have been the displacement of men by women in the conventional elite academic tracks.

5. SUMMARY AND CONCLUSIONS

The synthesis of the empirical studies in Shavit and Blossfeld (1992) suggests seven major conclusions:

First, whereas earlier studies of changes in the process of educational stratification in some of the countries yielded divergent results, the results of the Shavit and Blossfeld (1992) study are more homogenous. Two major patterns are identified: an equalization among socioeconomic strata in educational opportunity for Sweden and the Netherlands, and virtual stability in other countries.

Second, in all thirteen countries, there was a marked educational expansion during the periods examined. This is equally true for industrializing and for advanced industrialized societies, for capitalist and for socialist states, and for Western and non-Western

countries. Furthermore, in most cases, expansion was not uniform across all educational levels. Instead, educational systems expanded much more rapidly at the primary and secondary levels than at the post-secondary level. Consequently, as larger proportions of successive cohorts enter and complete secondary education, they encounter severe bottlenecks in the transitions to tertiary education. In some cases, access to tertiary education actually declined across cohorts, as the pool of candidates increased dramatically.

In some countries (e.g. Germany, Switzerland, Sweden, Poland, and Israel (Shavit, 1989)) the expansion of secondary education has been accompanied by a growing differentiation into academic and vocational tracks or programs. The expansion of vocational, non-college education enabled these systems to incorporate growing proportions of children from lower strata who would complete secondary education but would not be considered for further academic education. This led to an opening up of secondary education without disturbing the basically exclusive character of higher education.

Third, the analyses of linear regressions of educational attainment reveal a mixed pattern. In two countries (Sweden and the Netherlands) there is a clear overall decline in the effect of social background for the first two transitions across cohort, whereas, in six countries the effects of socioeconomic origin on education attainment have remained virtually stable. In the remaining five countries there have been both a decline and stability or even increases in the effects. Thus, expansion of education does not consistently reduce the association between social origins of students and their educational attainment.

Fourth, the effect of social origin on grade progression is strong at the beginning of the educational career and declines for later educational transitions (except for Switzerland). Thus, socioeconomic selection occurs at early stages of the educational career. This is partly due to the fact that school systems select students on the basis of characteristics which are correlated with their socioeconomic origins (Mare 1980, 1981). However,

there is also some indication that the effects of socioeconomic origins decline across educational transitions because older students are less dependent on the family of origin in making (and financing) educational decisions.

Fifth, while the effects of students' origins decline across transitions, there is little change in these effects across cohorts. There are only two exceptions to this pattern: Sweden and the Netherlands in which the effects of father's occupation and education on the low and intermediate transitions declined. Both the Dutch (De Graaf and Ganzeboom) and Swedish (Jonsson) authors attribute the declining effects to a general policy of equalization of living conditions in their country. In Sweden, there has been an equalization of life chances for the different social strata, and in the Netherlands there has been a long-term opening up in many aspects of the stratification system. Most interestingly, the radical social policies of the socialist states did not have similar consequences. This is consistent with the assertion that under socialism, the bureaucratic elites were as effective in protecting the interests of their children as elites in other types of society. The stability in the association between social origins and educational transitions in eleven of the thirteen societies, indicates that educational selection persistently favors children of privileged social origins. This is consistent with the argument that dominant social class manage to resist changes in the school system which might deminish their relative advantage in the educational process.

Sixth, for ten of the thirteen societies, data were available on both men and women. In all ten cases, the data reveal a marked reduction in gender differences in means of educational attainment. In some cases, most notably, in Poland, the United States and Germany, the educational gender gap has actually been reversed. Thus, girls were more likely to benefit from the expansion of educational systems than lower class boys. In addition, the association between gender and educational transitions has declined in each of the studies in which it was estimated. Two important causes for this decline are suggested: girls are less often tracked into dead-end vocational tracks (Heyns and Bialecki) and families' discrimination against girls has declined, especially in the middle class (Jonsson).

Finally, the impact of educational reforms on changes in educational stratification seems to be negligible. Nowhere have they reduced inequalities of educational opportunity between socioeconomic strata. Even in Sweden and the Netherlands, which report declines in the association, the decline is not attributable to the educational reforms, but occurred before the educational reforms.

The thirteen societies represent very different social and educational structures. We noted that some were socialist, others capitalist and some in between. Some have highly centralized educational systems while in others the systems are locally controlled (e.g. United States, Switzerland, Germany). The countries also display marked cultural variations. And yet, in all but two cases, there are two marked similarities between them all. They all experienced dramatic educational expansions during the twentieth century, and they all exhibit stability of socioeconomic inequalities of educational opportunities. Thus, whereas the proportions of all social classes attending all educational levels have increased, the relative advantage associated with privileged origins persists in all but two of the thirteen societies.

Many people will still be somewhat surprised that rapid educational expansion did not reduce inequalities of educational opportunities. The reason may be that "educational opportunity" is still a rather vague and unspecified concept. Educational opportunity - as we understand it - means the chance to attain a specific educational level, rather then its attainment. It is a relative not an absolute concept. As a consequence of educational expansion societies can produce a higher average level of educational attainment from one birth cohort to the next, without changing the educational opportunities of children from different social strata. Thus, educational expansion may even account for the stable patterns of educational stratification. It is well understood that when pie increases in size, there is less conflict as to the relative size of the slices. For example, class conflict is more pronounced during periods of decline than during periods of economic growth. Similarly, there are two mechanisms through which the education of disadvantaged classes may be enhanced: through educational expansion whereby the educational attainment of all classes are increased, and/or through a change of the rules that govern

educational selection and reduce or eliminate the disadvantage of lower social strata. As long as the educational attainment of lower social strata are rapidly increasing, political attention can neglect any parallel increases among the privileged classes. Thus, educational expansion can alleviate political pressure to reduce inequalities. This is the essence of Halsey, Heath and Ridge's assertion which is discussed extensively at the beginning of this chapter.

Similar conclusions have been reached by both Simkus and Andorka (1982) who have argued that there are two mechanisms through which the allocation of education becomes more equal. First, administrative social selection, sponsoring the mobility of those from lower social origins, at the expense of those from the upper strata; and second, compulsory comprehensive education from the lowest grades up. In the long run, societies have found the latter approach more politically palatable than the former.

Thus, the Modernization Theorists' hypothesis that educational expansion results in greater equality of educational opportunity must now turned on its head: expansion actually facilitates the persistence of inequalities in educational opportunity.

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Table 1.1: Trends in educational expansion by country

Country	Cohort	Change in mean educational attainment	Expansion of educational levels: Primary	Low secondary	High secondary	Tertiary	Change in gender differences
Western capitalist:							
USA	1910-1964	++	universal	++	++	+	–
Germany	1916-1965	++	universal	++	+	+	–
The Netherlands	1891-1960	++	universal	++	+	0	–
Sweden	1902-1967	++	universal	++	+	+	–
Great Britain	1913-1952	++	not studied	++	+	+	not studied
Italy	1920-1967	++	universal	++	++	+	–
Switzerland	1950,1960	+	universal	+	+	+	–
Israel	1900-1970	++	universal	++	++	++	–
Non-Western capitalist:							
Taiwan	1920-1968	++	universal	++	+	0	not studied
Japan	1905-1955	++	universal	++	++	+	not studied
Western socialist:							
Czechoslovakia	1918-1957	++	universal	++	+	+	–
Hungary	1910-1960	++	universal	-+	-+	0	–
Poland	1912-1969	++	universal	++	+	0	–

Legend: "++" marked expansion; "+" expansion; "0" small or no expansion; "–" marked expansion; "-+" means contraction and then expansion; "universal" has become universal or nearly universal.

Table 1.2: Trends in the dependence of educational attainment on social origin

Country	Changes in independent variables		
	Father's education	Father's occupation	Additional variables
Western capitalist:			
USA	o	-	Mother's ed. (-); Farm origin (-)
Germany	o	o	- none -
The Netherlands	-	-	- none -
Sweden	-	-	Community size (-)
Great Britain	o	o	- none -
Italy	-	+	- none -
Switzerland	o	o	- none -
Israel	o	o	Farm origin (-)
Non-Western capitalist:			
Taiwan	-	o	Mother's ed. (o); Farm origin (o); Ethnicity (-); Urban Residence (-)
Japan	-	o	- none -
Western socialist:			
Czechoslovakia	-/o	o	- none -
Hungary	o	o	- none -
Poland	o	o	- none -

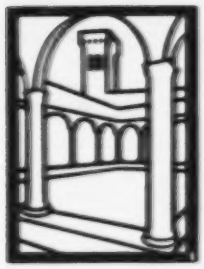
Legend: "+" means increasing dependence; "o" means no change in the dependence; "-" means decreasing dependence; "-/+" means at first decreasing and then increasing.

Table 1.3: Trends in the dependence of grade progressions on social origin

Country	General pattern of effects of social origin across educational levels	Change of effect of social origin on grade progressions		
		Lower ed. level	Medium ed. level	Higher ed. level
Western capitalist:				
USA	decreasing 1)	o	-	o
Germany	decreasing	o	o	ni
The Netherlands	decreasing	-	-	ni
Sweden	decreasing	-	-	ni
Great Britain	decreasing	o	o	o
Italy	decreasing	o	o	o
Switzerland	inconsistent	-	--	+
Israel	decreasing	o	o	o
Non-Western capitalist:				
Taiwan	decreasing 2)	o	o	o
Japan	decreasing	o	o	o
Western socialist:				
Czechoslovakia	decreasing	o	o	o
Hungary	decreasing	o	o	o
Poland	decreasing	o	o	o

Legend: "+" means increasing dependence across cohorts; "o" means no change in the dependence across cohorts; "-" means decreasing dependence across cohorts; "ni" means change not important because effect is not significant at that level

1) There is, however, a stronger effect of father's occupation at the highest level.
2) Effects show some kind of non-monotonic pattern at the beginning.



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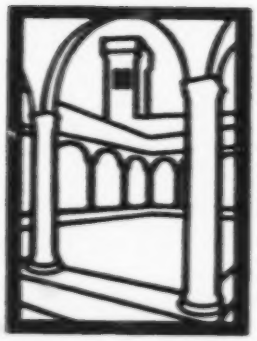

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